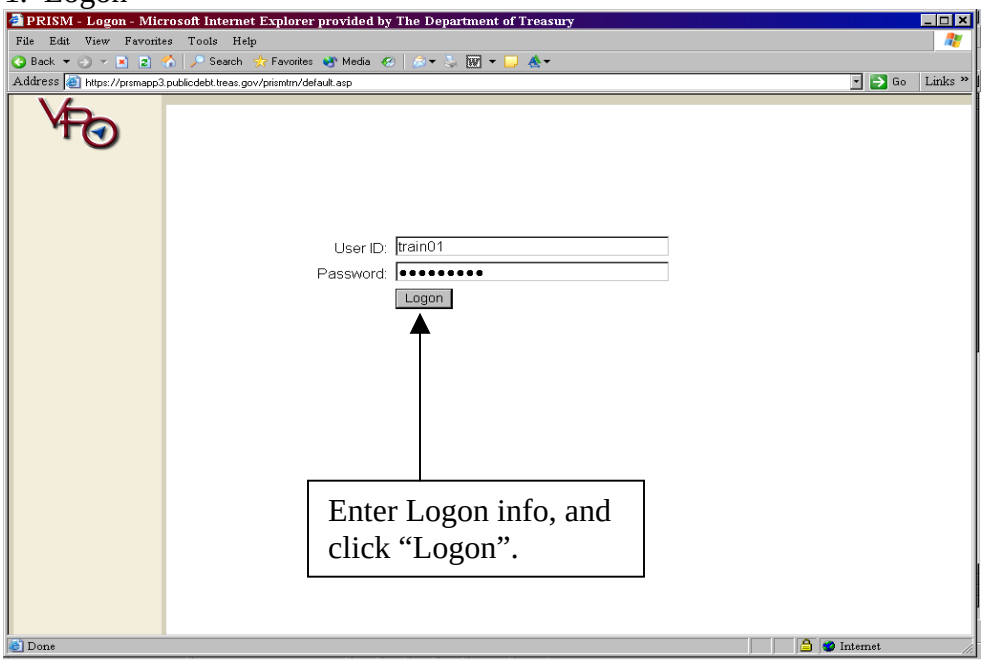
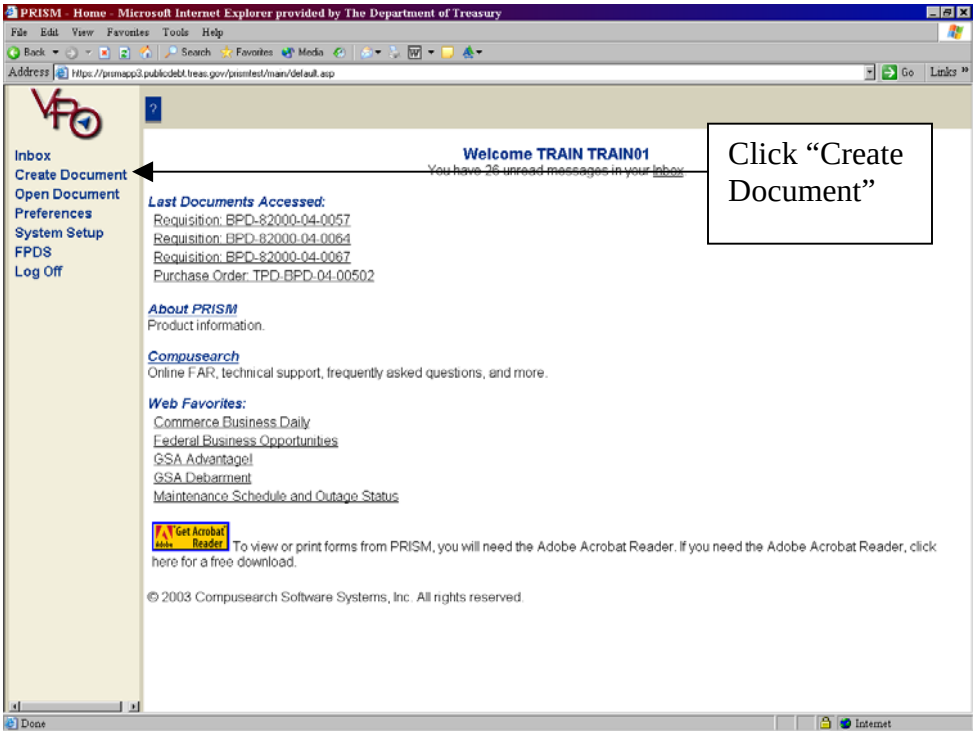
BPA Setup and Calls
11/23/2004

If BPA Setup has been completed then go to Call section of this QRG.

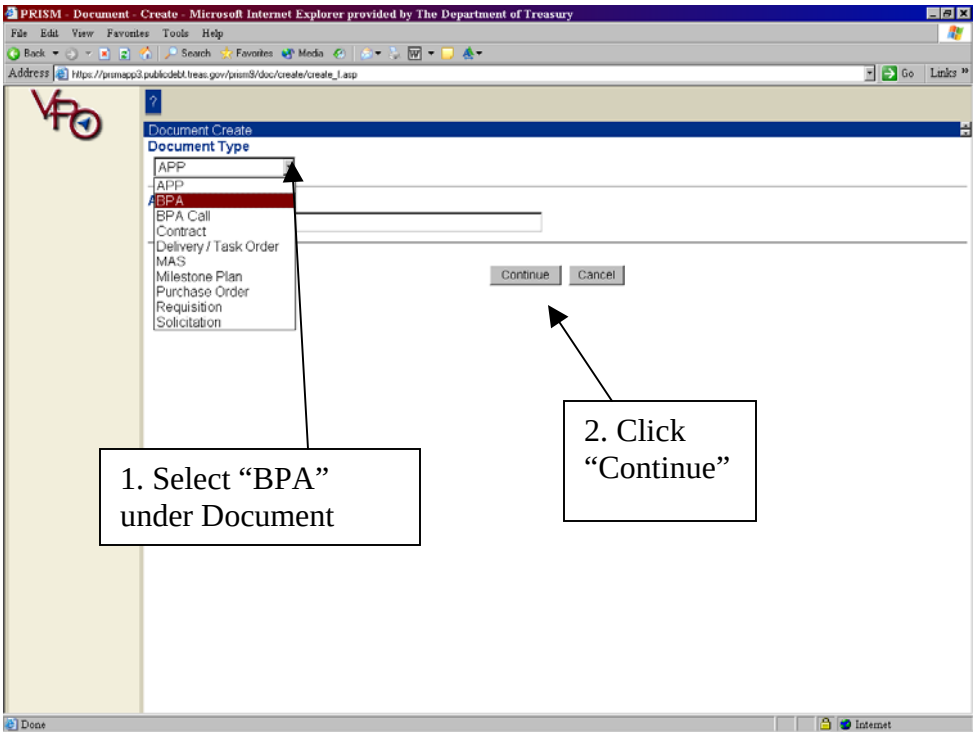
1. Logon



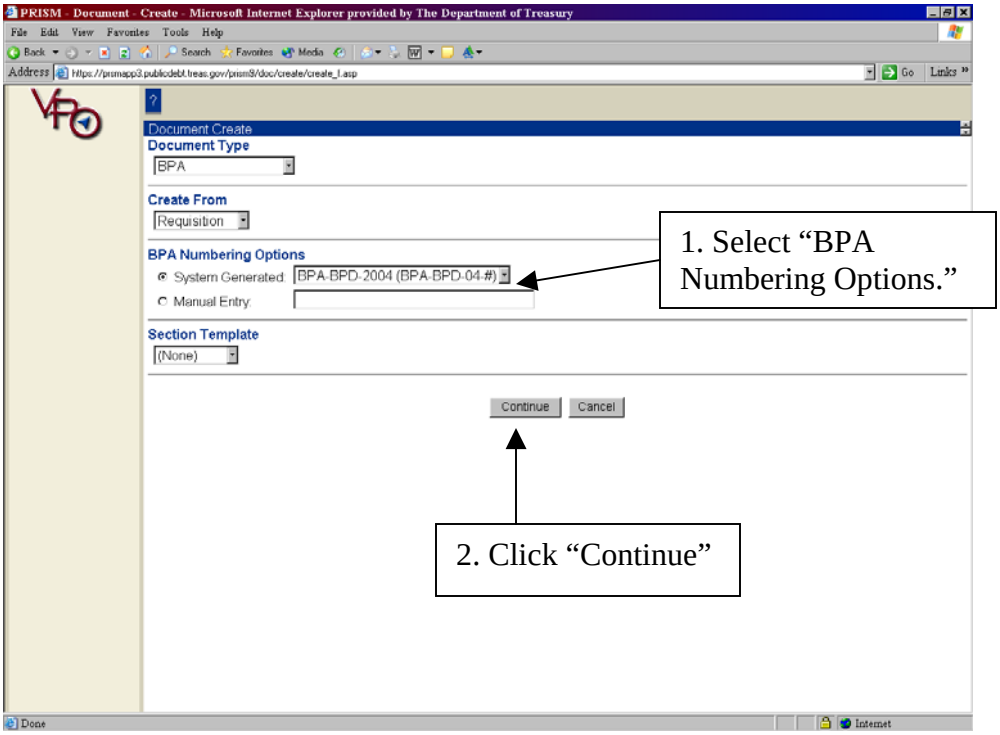
2.



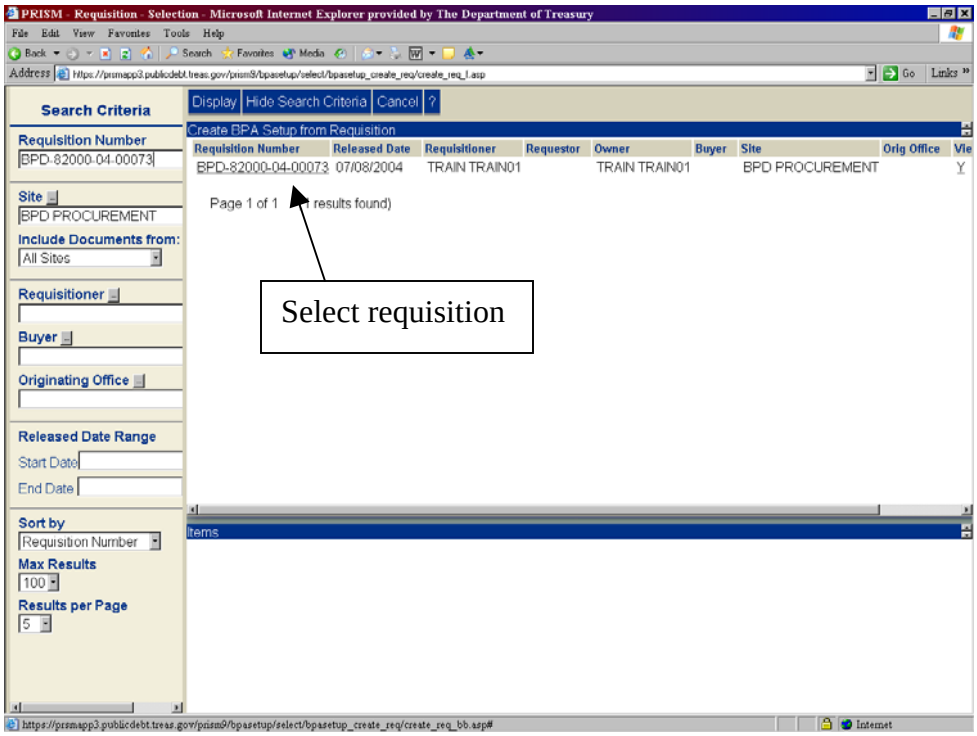
3.


PRISM - Document - Create - Microsoft Internet Explorer provided by The Department of Treasury
Document Create
Document Type
APP
APP
BPA
BPA Call
Contract
Delivery / Task Order
MAS
Milestone Plan
Purchase Order
Requisition
Solicitation
Continue
Cancel
1. Select "BPA" under Document
2. Click "Continue"

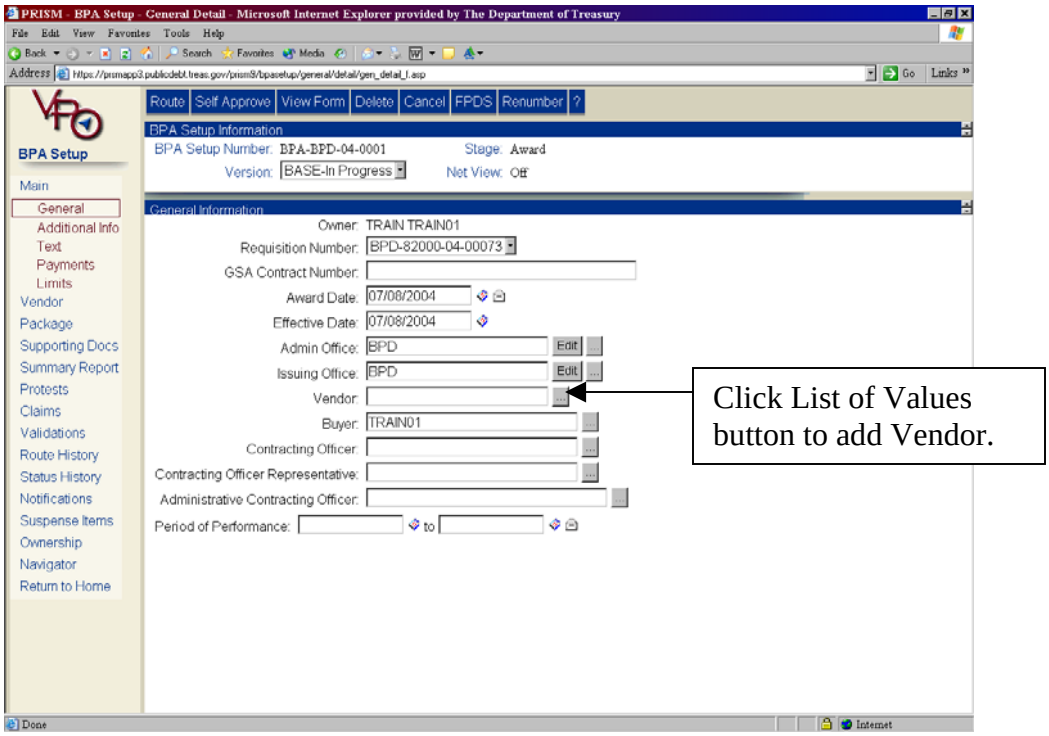
4.


PRISM - Document - Create - Microsoft Internet Explorer provided by The Department of Treasury
Document Create
Document Type
BPA
Create From
Requisition
BPA Numbering Options
System Generated
BPA-BPD-2004 (BPA-BPD-04-#)
Manual Entry
Section Template
(None)
Continue
Cancel
1. Select "BPA Numbering Options."
2. Click "Continue"

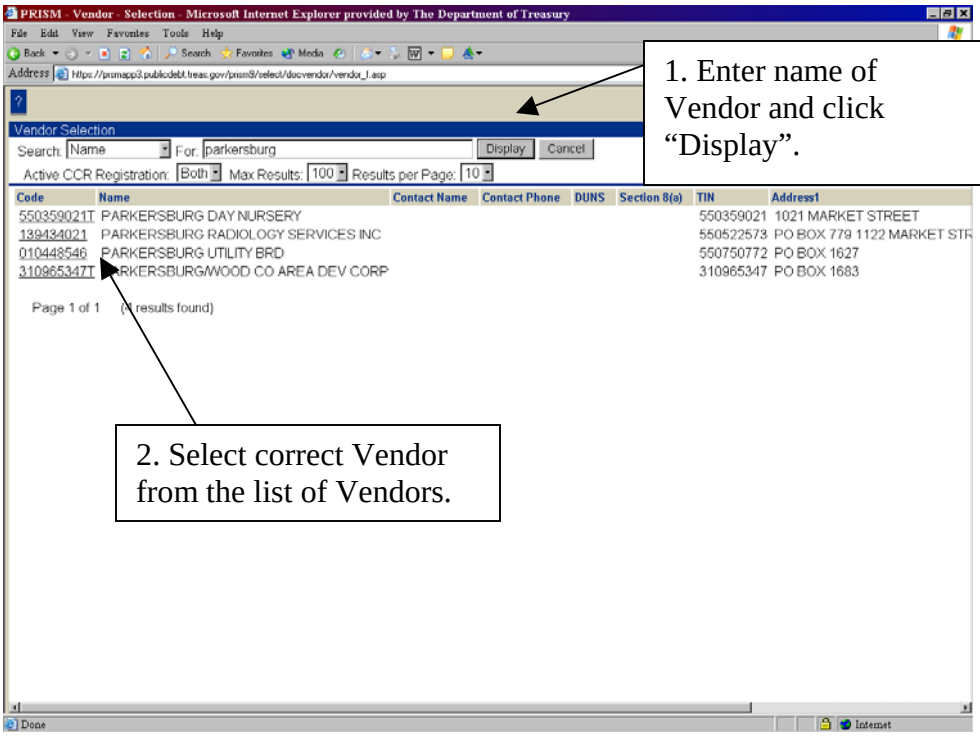
5.


PRISM - Requisition - Selection - Microsoft Internet Explorer provided by The Department of Treasury
Search Criteria
Requisition Number
BPD-82000-04-00073
Site
BPD PROCUREMENT
Include Documents from:
All Sites
Requisitioner
Buyer
Originating Office
Released Date Range
Start Date
End Date
Sort by
Requisition Number
Max Results
100
Results per Page
5
Display
Hide Search Criteria
Cancel
Create BPA Setup from Requisition
Requisition Number
Released Date
Requisitioner
Requestor
Owner
Buyer
Site
Orig Office
BPD-82000-04-00073
07/08/2004
TRAIN TRAIN01
TRAIN TRAIN01
BPD PROCUREMENT
Page 1 of 1
results found)
Items
Select requisition

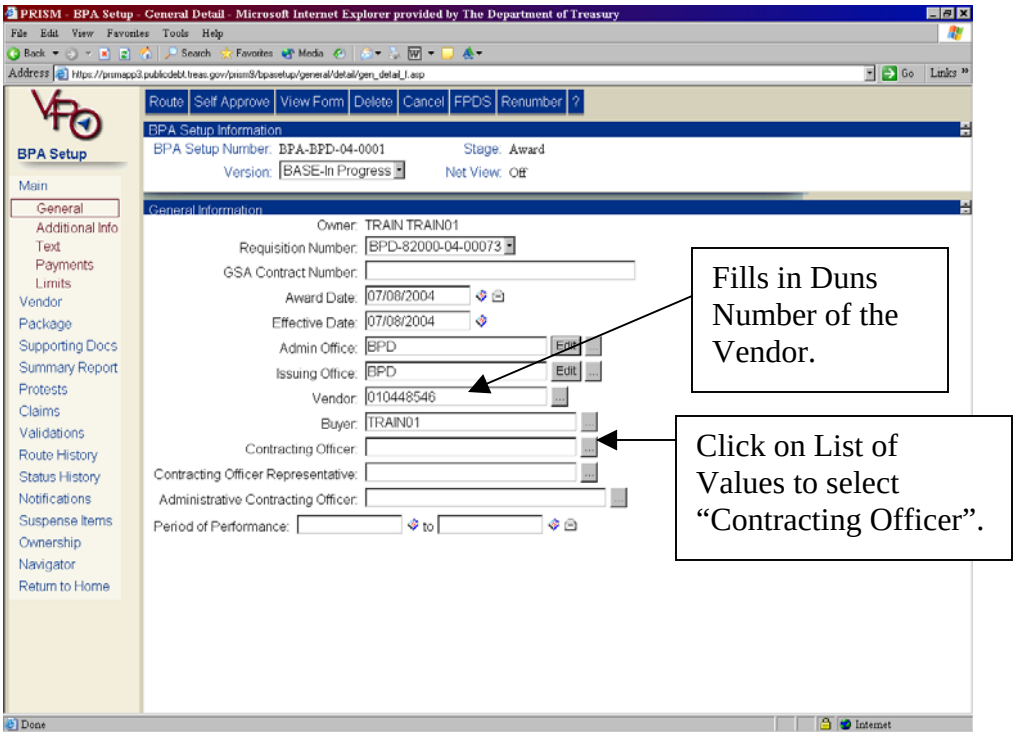
6.


PRISM - BPA Setup - General Detail - Microsoft Internet Explorer provided by The Department of Treasury
BPA Setup
Main
General
Additional Info
Text
Payments
Limits
Vendor
Package
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
Route
Self Approve
View Form
Delete
Cancel
FPDS
Renumber
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Stage: Award
Version: BASE-In Progress
Net View: Off
General Information
Owner: TRAIN TRAIN01
Requisition Number: BPD-82000-04-00073
GSA Contract Number:
Award Date: 07/08/2004
Effective Date: 07/08/2004
Admin Office: BPD
Issuing Office: BPD
Vendor:
Buyer: TRAIN01
Contracting Officer:
Contracting Officer Representative:
Administrative Contracting Officer:
Period of Performance:
to
Click List of Values button to add Vendor.

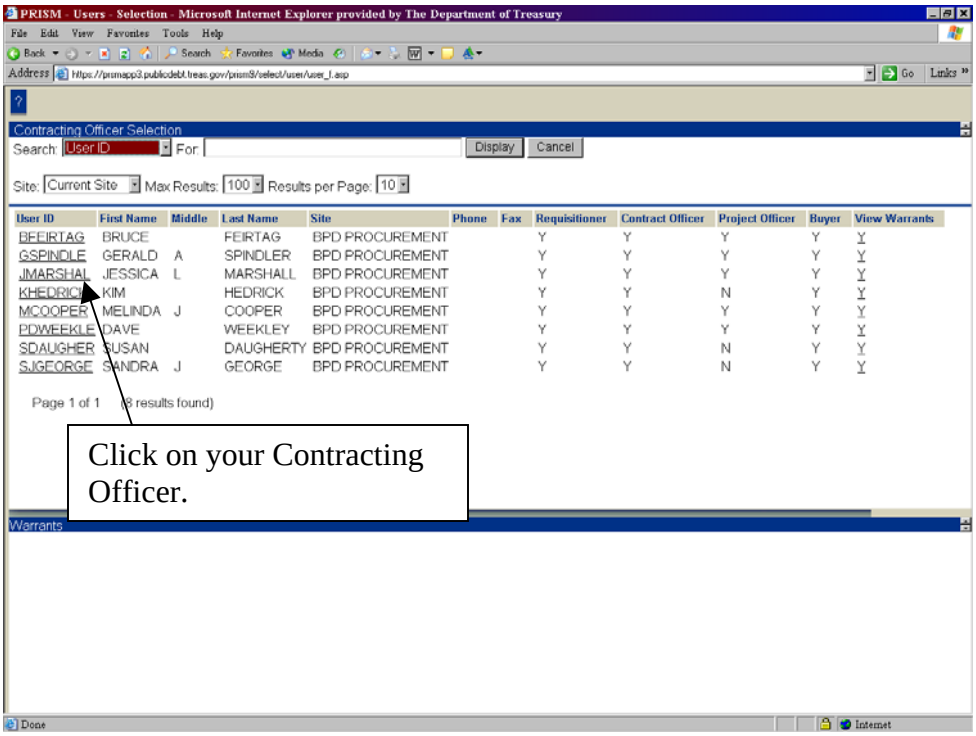
7.


PRISM - Vendor - Selection - Microsoft Internet Explorer provided by The Department of Treasury
Vendor Selection
Search: Name For: parkersburg Display Cancel
Active CCR Registration: Both Max Results: 100 Results per Page: 10
Code Name Contact Name Contact Phone DUNS Section 8(a) TIN Address1
550359021T PARKERSBURG DAY NURSERY 550359021 1021 MARKET STREET
139434021 PARKERSBURG RADIOLOGY SERVICES INC 550522573 PO BOX 779 1122 MARKET STR
010448546 PARKERSBURG UTILITY BRD 550750772 PO BOX 1627
310965347T RKERSBURG/WOOD CO AREA DEV CORP 310965347 PO BOX 1683
Page 1 of 1
1. Enter name of Vendor and click "Display".
2. Select correct Vendor from the list of Vendors.

8.

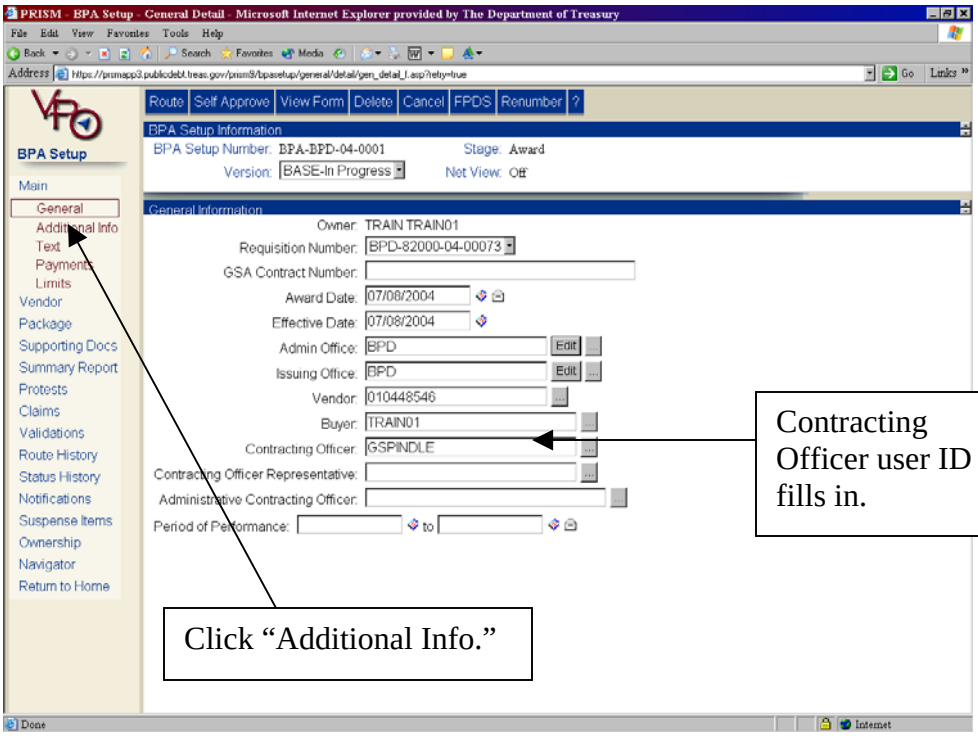

PRISM - BPA Setup - General Detail - Microsoft Internet Explorer provided by The Department of Treasury
Route Self Approve View Form Delete Cancel FPDS Renumber ?
BPA Setup
Main
General
Additional Info
Text
Payments
Limits
Vendor
Package
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001 Stage: Award
Version: BASE-In Progress Net View: Off
General Information
Owner: TRAIN TRAIN01
Requisition Number: BPD-82000-04-00073
GSA Contract Number:
Award Date: 07/08/2004
Effective Date: 07/08/2004
Admin Office: BPD Edit
Issuing Office: BPD Edit
Vendor: 010448546
Buyer: TRAIN01
Contracting Officer:
Contracting Officer Representative:
Administrative Contracting Officer:
Period of Performance: to
Fills in Duns Number of the Vendor.
Click on List of Values to select "Contracting Officer".

9.



Click on your Contracting Officer.

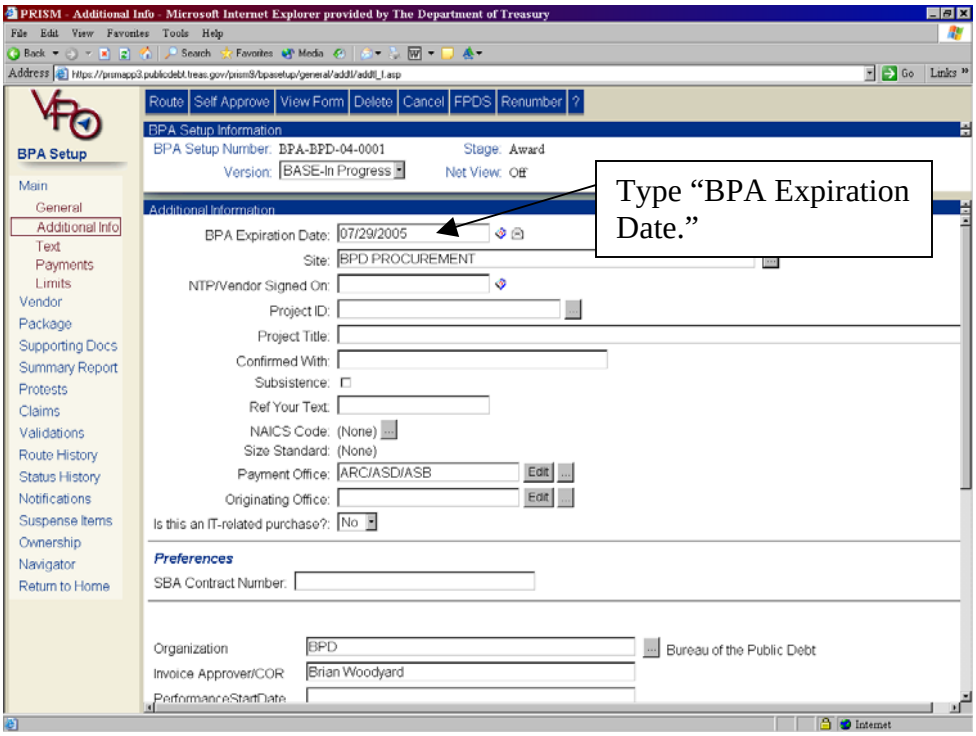
10.



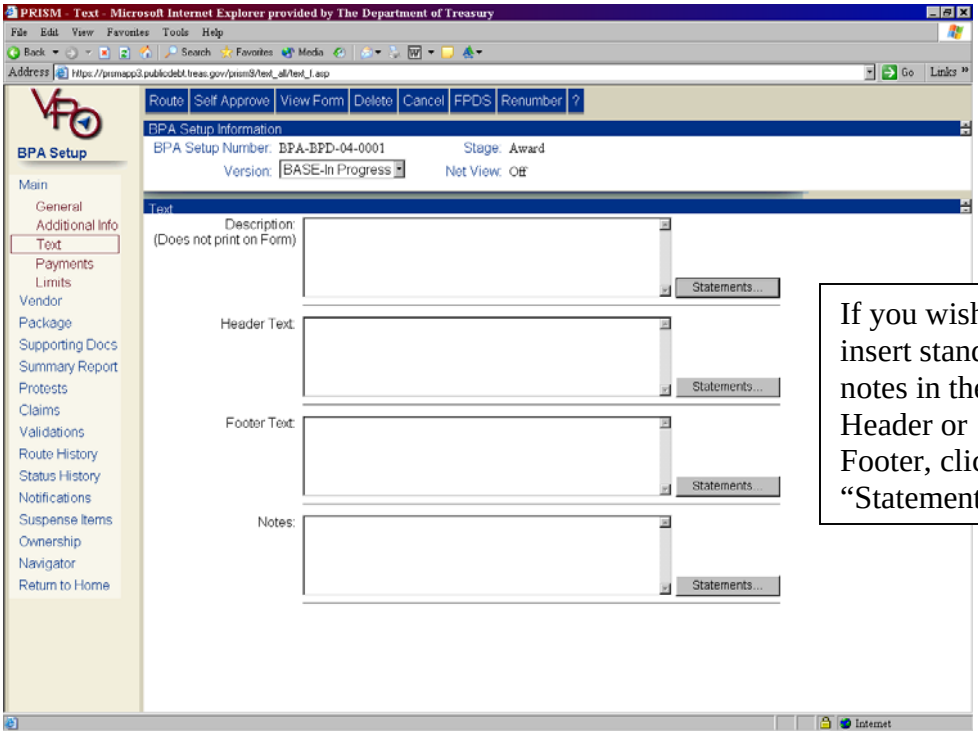
Contracting Officer user ID fills in.

Click “Additional Info.”

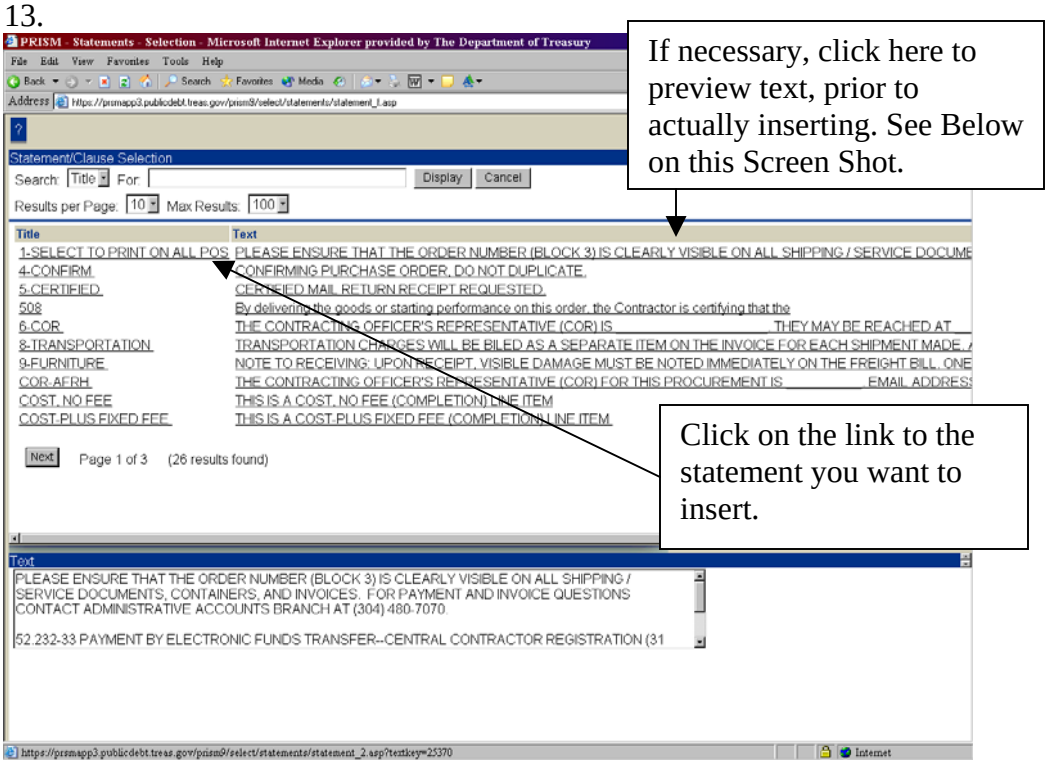
11.


PRISM - Additional Info - Microsoft Internet Explorer provided by The Department of Treasury
Route
Self Approve
View Form
Delete
Cancel
FPDS
Renumber
BPA Setup
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Stage: Award
Version: BASE-In Progress
Net View: Off
Additional Information
BPA Expiration Date: 07/29/2005
Site: BPD PROCUREMENT
NTP/Vendor Signed On:
Project ID:
Project Title:
Confirmed With:
Subsistence:
Ref Your Text:
NAICS Code: (None)
Size Standard: (None)
Payment Office: ARC/ASD/ASB
Originating Office:
Is this an IT-related purchase?: No
Preferences
SBA Contract Number:
Organization: BPD
Bureau of the Public Debt
Invoice Approver/COR: Brian Woodyard
Main
General
Additional Info
Text
Payments
Limits
Vendor
Package
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
Type "BPA Expiration Date."

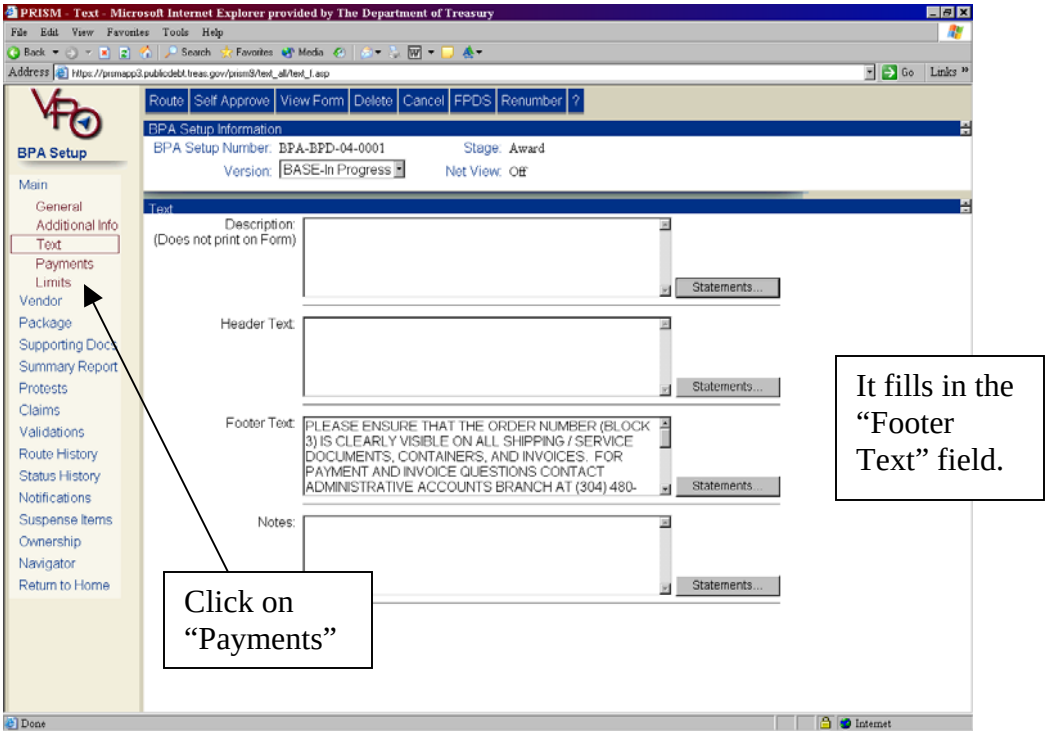
12.


PRISM - Text - Microsoft Internet Explorer provided by The Department of Treasury
Route
Self Approve
View Form
Delete
Cancel
FPDS
Renumber
BPA Setup
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Stage: Award
Version: BASE-In Progress
Net View: Off
Text
Description: (Does not print on Form)
Statements...
Header Text:
Statements...
Footer Text:
Statements...
Notes:
Statements...
Main
General
Additional Info
Text
Payments
Limits
Vendor
Package
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
If you wish to insert standard notes in the Header or Footer, click on "Statements."

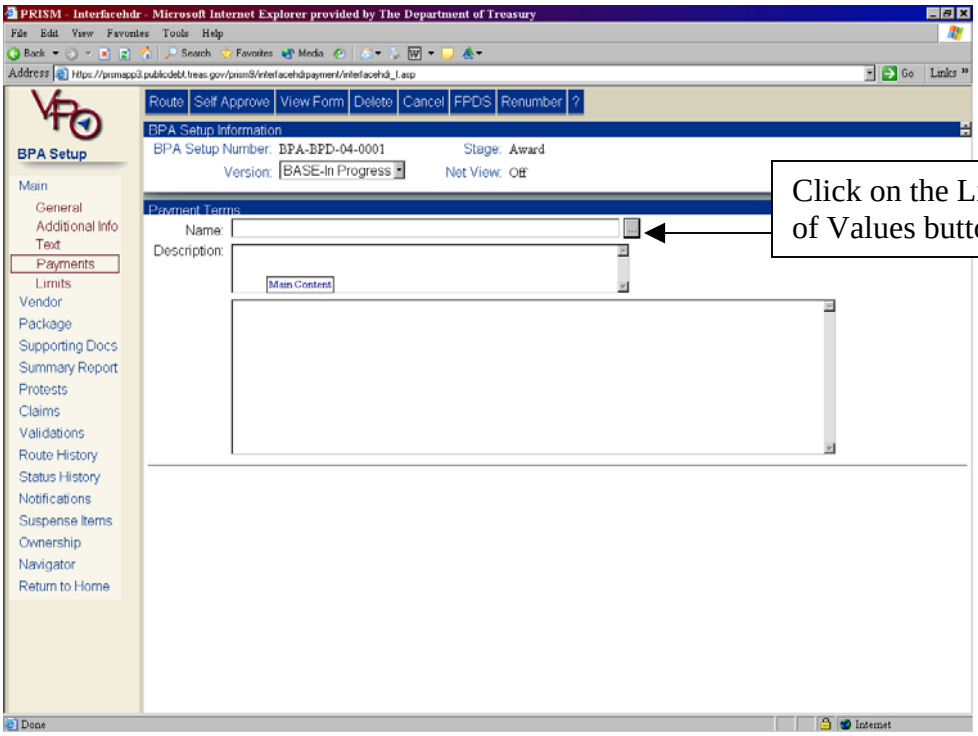
13.


If necessary, click here to preview text, prior to actually inserting. See Below on this Screen Shot.
Click on the link to the statement you want to insert.
PRISM - Statements - Selection - Microsoft Internet Explorer provided by The Department of Treasury
Statement/Clause Selection
Search: Title For:
Display
Cancel
Results per Page: 10 Max Results: 100
Title
Text
1-SELECT TO PRINT ON ALL POS
PLEASE ENSURE THAT THE ORDER NUMBER (BLOCK 3) IS CLEARLY VISIBLE ON ALL SHIPPING / SERVICE DOCUME
4-CONFIRM
CONFIRMING PURCHASE ORDER, DO NOT DUPLICATE.
5-CERTIFIED
CERTIFIED MAIL RETURN RECEIPT REQUESTED.
508
By delivering the goods or starting performance on this order, the Contractor is certifying that the
6-COR
THE CONTRACTING OFFICER'S REPRESENTATIVE (COR) IS THEY MAY BE REACHED AT
8-TRANSPORTATION
TRANSPORTATION CHARGES WILL BE BILED AS A SEPARATE ITEM ON THE INVOICE FOR EACH SHIPMENT MADE.
9-FURNITURE
NOTE TO RECEIVING: UPON RECEIPT, VISIBLE DAMAGE MUST BE NOTED IMMEDIATELY ON THE FREIGHT BILL. ONE
COR-AFRH
THE CONTRACTING OFFICER'S REPRESENTATIVE (COR) FOR THIS PROCUREMENT IS EMAIL ADDRES
COST, NO FEE
THIS IS A COST, NO FEE (COMPLETION) LINE ITEM
COST-PLUS FIXED FEE
THIS IS A COST-PLUS FIXED FEE (COMPLETION) LINE ITEM
Next
Page 1 of 3 (26 results found)
Text
PLEASE ENSURE THAT THE ORDER NUMBER (BLOCK 3) IS CLEARLY VISIBLE ON ALL SHIPPING / SERVICE DOCUMENTS, CONTAINERS, AND INVOICES. FOR PAYMENT AND INVOICE QUESTIONS CONTACT ADMINISTRATIVE ACCOUNTS BRANCH AT (304) 480-7070.
52.232-33 PAYMENT BY ELECTRONIC FUNDS TRANSFER--CENTRAL CONTRACTOR REGISTRATION (31

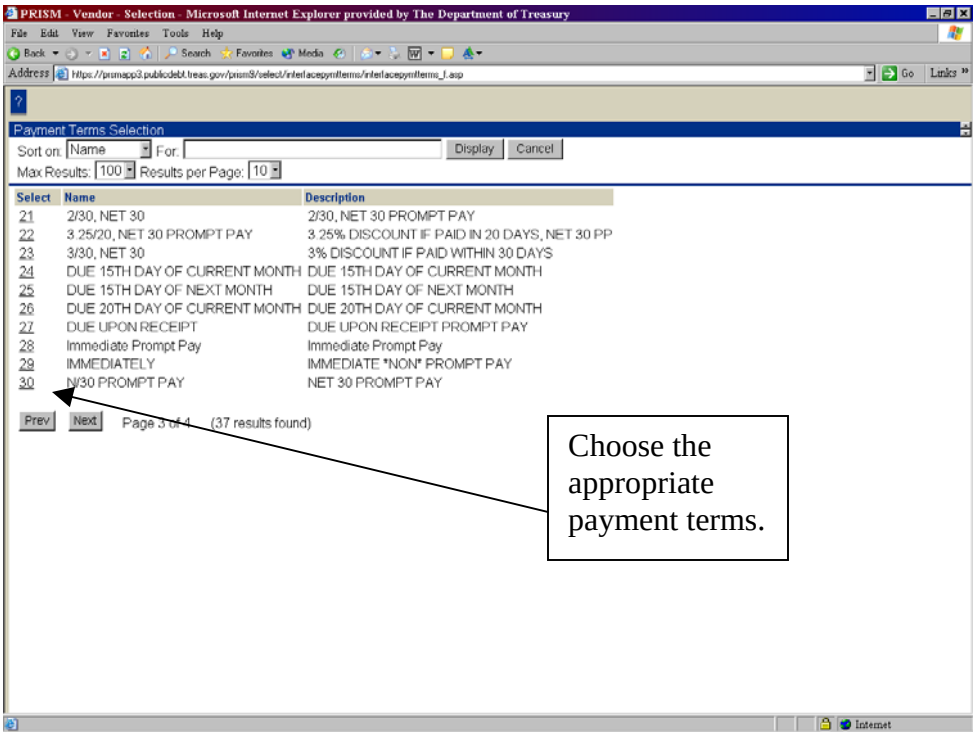
14.


It fills in the "Footer Text" field.
Click on "Payments"
PRISM - Text - Microsoft Internet Explorer provided by The Department of Treasury
BPA Setup
Main
General
Additional Info
Text
Payments
Limits
Vendor
Package
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
Route
Self Approve
View Form
Delete
Cancel
FPDS
Renumber
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Stage: Award
Version: BASE-In Progress
Net View: Off
Text
Description: (Does not print on Form)
Statements...
Header Text:
Statements...
Footer Text:
PLEASE ENSURE THAT THE ORDER NUMBER (BLOCK 3) IS CLEARLY VISIBLE ON ALL SHIPPING / SERVICE DOCUMENTS, CONTAINERS, AND INVOICES. FOR PAYMENT AND INVOICE QUESTIONS CONTACT ADMINISTRATIVE ACCOUNTS BRANCH AT (304) 480-
Statements...
Notes:
Statements...

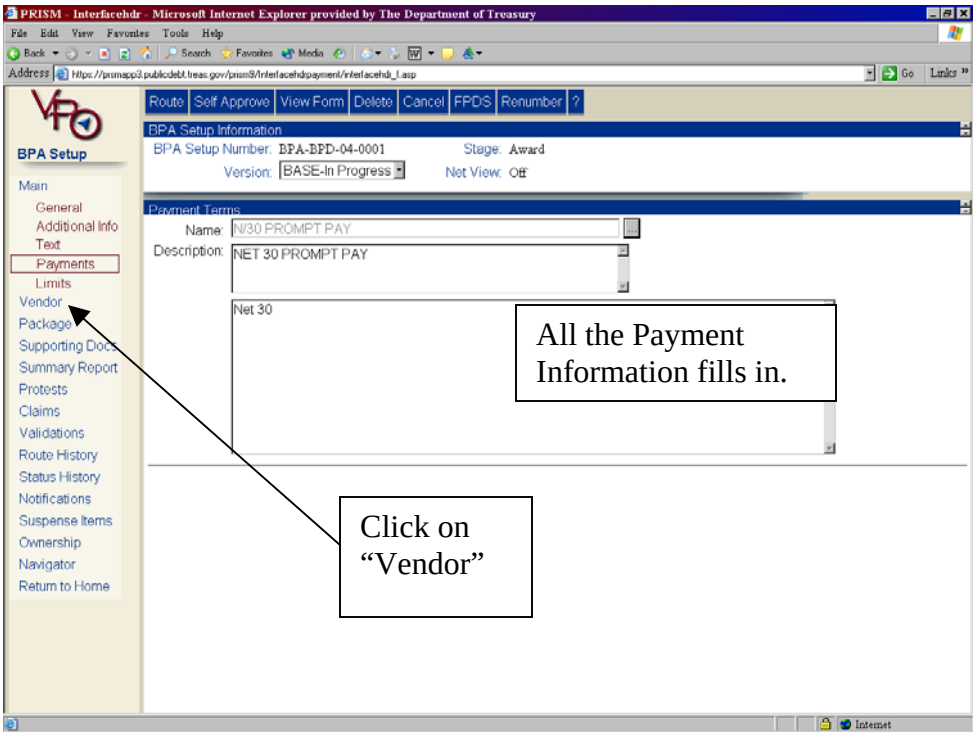
15.


PRISM - Interfacehdr - Microsoft Internet Explorer provided by The Department of Treasury
Route
Self Approve
View Form
Delete
Cancel
FPDS
Renumber
BPA Setup
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Stage: Award
Version: BASE-In Progress
Net View: Off
Payment Terms
Name:
Description:
Main Content
Main
General
Additional Info
Text
Payments
Limits
Vendor
Package
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
Click on the List of Values button.

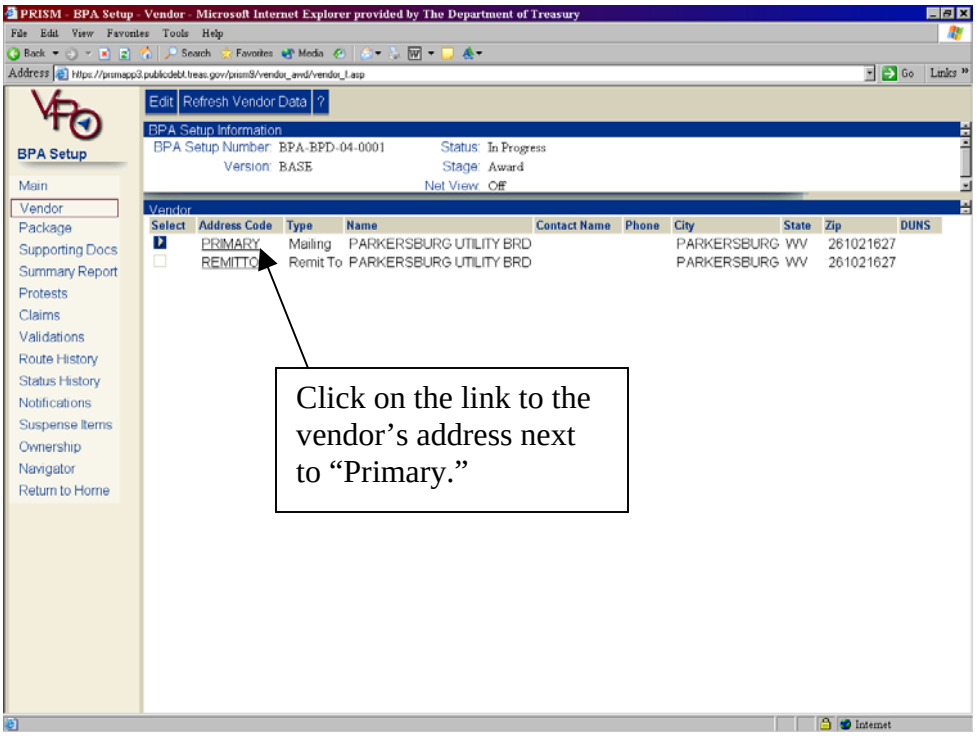
16.


PRISM - Vendor - Selection - Microsoft Internet Explorer provided by The Department of Treasury
Payment Terms Selection
Sort on: Name
For:
Display
Cancel
Max Results: 100
Results per Page: 10
Select
Name
Description
21 2/30, NET 30 2/30, NET 30 PROMPT PAY
22 3.25/20, NET 30 PROMPT PAY 3.25% DISCOUNT IF PAID IN 20 DAYS, NET 30 PP
23 3/30, NET 30 3% DISCOUNT IF PAID WITHIN 30 DAYS
24 DUE 15TH DAY OF CURRENT MONTH DUE 15TH DAY OF CURRENT MONTH
25 DUE 15TH DAY OF NEXT MONTH DUE 15TH DAY OF NEXT MONTH
26 DUE 20TH DAY OF CURRENT MONTH DUE 20TH DAY OF CURRENT MONTH
27 DUE UPON RECEIPT DUE UPON RECEIPT PROMPT PAY
28 Immediate Prompt Pay Immediate Prompt Pay
29 IMMEDIATELY IMMEDIATE *NON* PROMPT PAY
30 N/30 PROMPT PAY NET 30 PROMPT PAY
Prev
Next
Page 3 of 4 (37 results found)
Choose the appropriate payment terms.

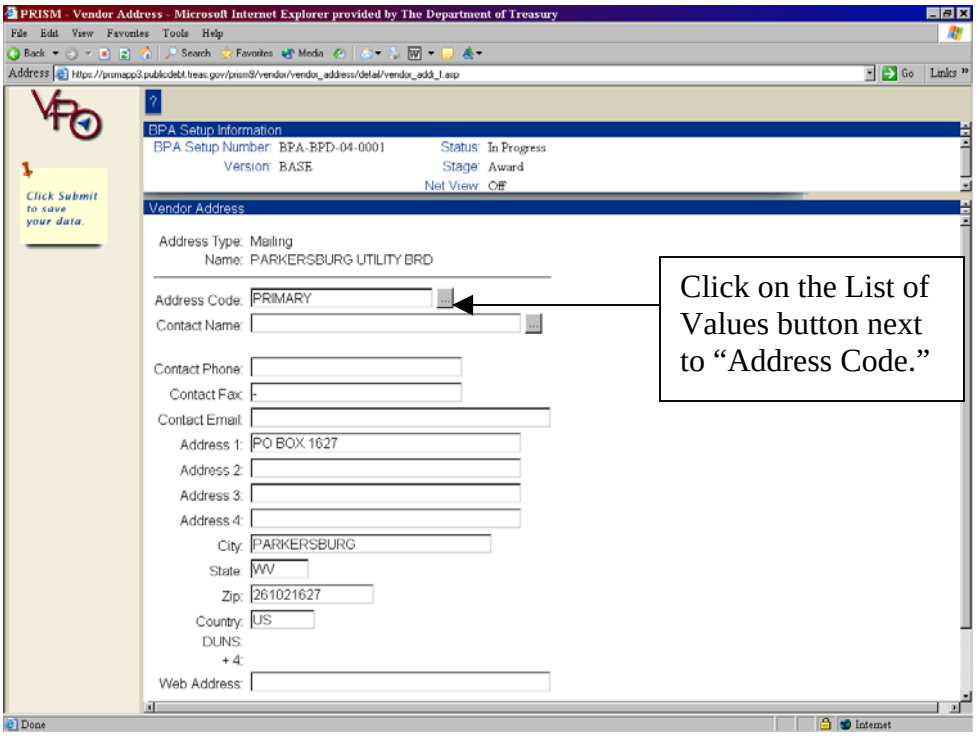
17.


PRISM - Interfacehdr - Microsoft Internet Explorer provided by The Department of Treasury
BPA Setup
Route
Self Approve
View Form
Delete
Cancel
FPDS
Renumber
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Stage: Award
Version: BASE-In Progress
Net View: Off
Payment Terms
Name: N/30 PROMPT PAY
Description: NET 30 PROMPT PAY
Net 30
Main
General
Additional Info
Text
Payments
Limits
Vendor
Package
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
All the Payment Information fills in.
Click on "Vendor"

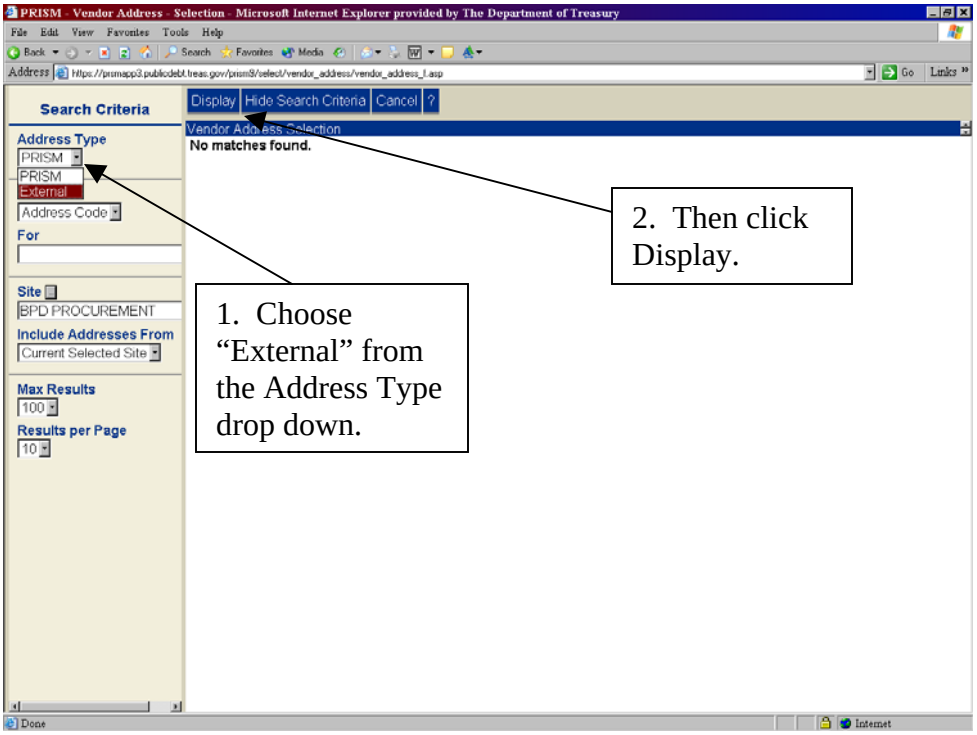
18.


PRISM - BPA Setup - Vendor - Microsoft Internet Explorer provided by The Department of Treasury
BPA Setup
Edit
Refresh Vendor Data
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Status: In Progress
Version: BASE
Stage: Award
Net View: Off
Vendor
Select
Address Code
Type
Name
Contact Name
Phone
City
State
Zip
DUNS
PRIMARY
Mailing
PARKERSBURG UTILITY BRD
PARKERSBURG
WV
261021627
REMITTO
Remit To
PARKERSBURG UTILITY BRD
PARKERSBURG
WV
261021627
Main
Vendor
Package
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
Click on the link to the vendor's address next to "Primary."

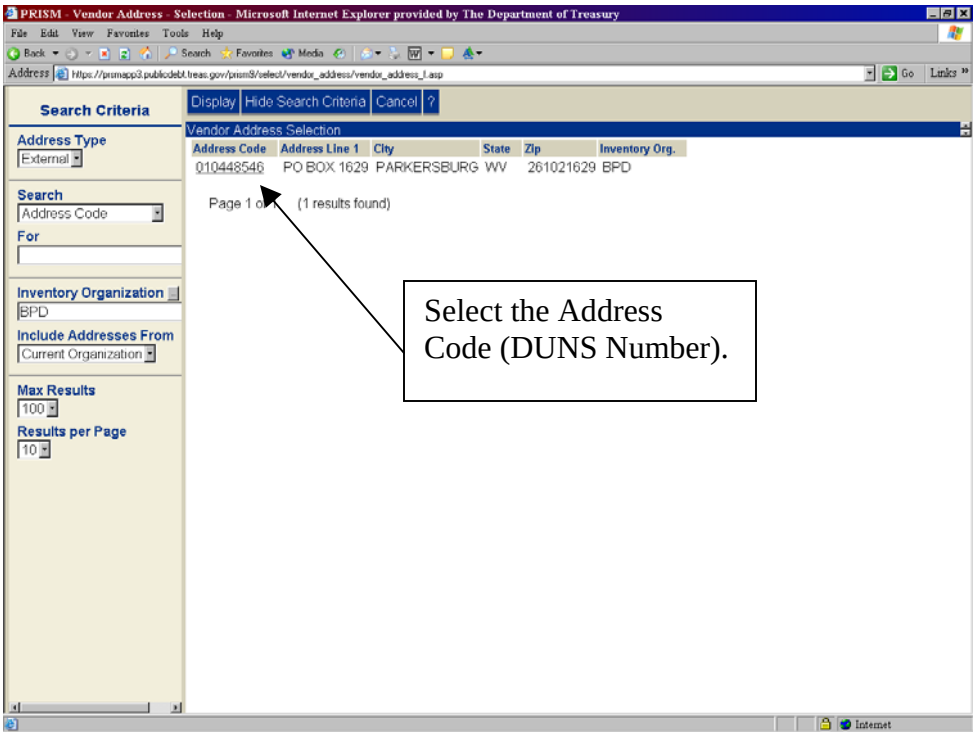
19.


PRISM - Vendor Address - Microsoft Internet Explorer provided by The Department of Treasury
Click Submit to save your data.
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Version: BASE
Status: In Progress
Stage: Award
Net View: Off
Vendor Address
Address Type: Mailing
Name: PARKERSBURG UTILITY BRD
Address Code: PRIMARY
Contact Name:
Contact Phone:
Contact Fax:
Contact Email:
Address 1: PO BOX 1627
Address 2:
Address 3:
Address 4:
City: PARKERSBURG
State: WV
Zip: 261021627
Country: US
DUNS:
+ 4:
Web Address:
Click on the List of Values button next to "Address Code."

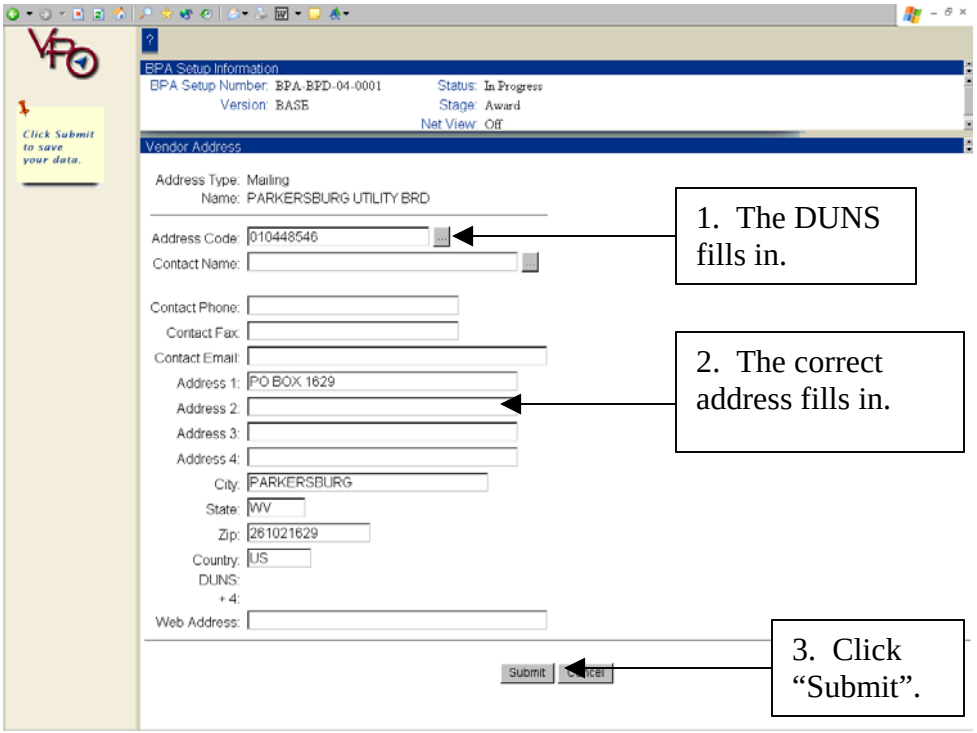
20.


PRISM - Vendor Address - Selection - Microsoft Internet Explorer provided by The Department of Treasury
Search Criteria
Address Type
PRISM
PRISM
External
Address Code
For
Site
BPD PROCUREMENT
Include Addresses From
Current Selected Site
Max Results
100
Results per Page
10
Display
Hide Search Criteria
Cancel
Vendor Address Selection
No matches found.
1. Choose "External" from the Address Type drop down.
2. Then click Display.

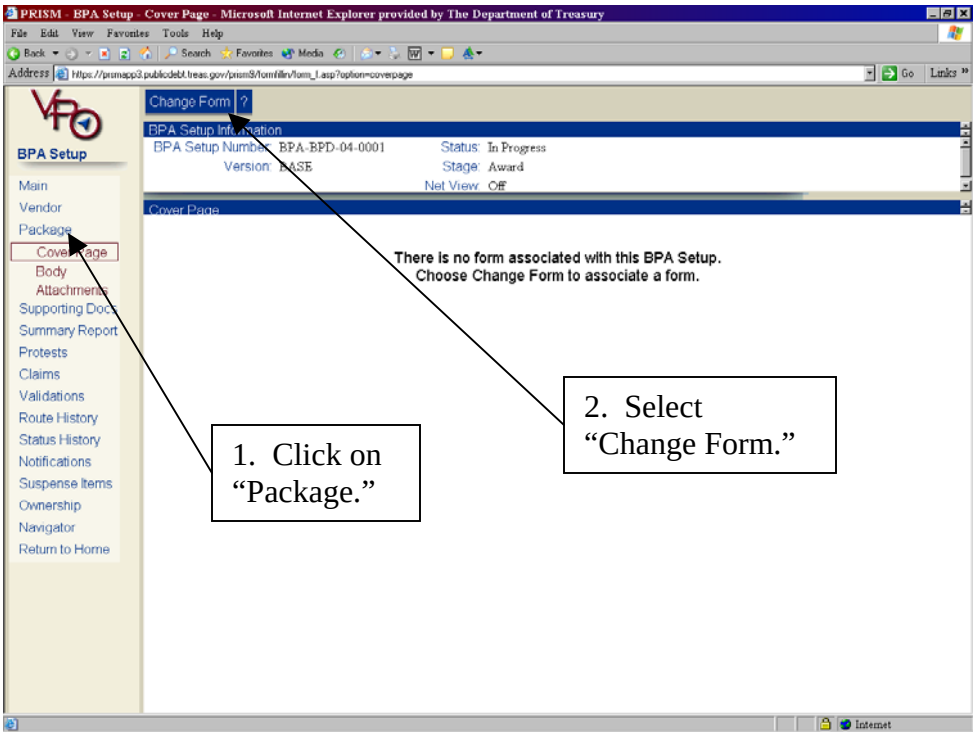
21.


PRISM - Vendor Address - Selection - Microsoft Internet Explorer provided by The Department of Treasury
Search Criteria
Address Type
External
Search
Address Code
For
Inventory Organization
BPD
Include Addresses From
Current Organization
Max Results
100
Results per Page
10
Display
Hide Search Criteria
Cancel
Vendor Address Selection
Address Code
Address Line 1
City
State
Zip
Inventory Org.
010448546
PO BOX 1629
PARKERSBURG
WV
261021629
BPD
(1 results found)
Select the Address Code (DUNS Number).

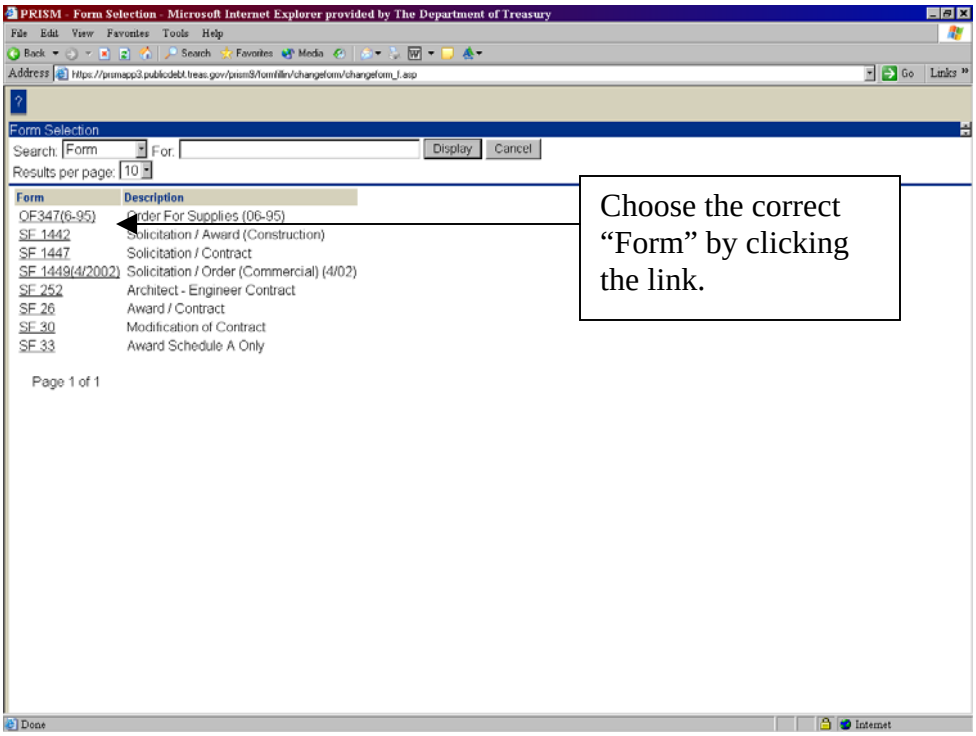
22.


Click Submit to save your data.
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Version: BASE
Status: In Progress
Stage: Award
Net View: Off
Vendor Address
Address Type: Mailing
Name: PARKERSBURG UTILITY BRD
Address Code: 010448546
Contact Name:
Contact Phone:
Contact Fax:
Contact Email:
Address 1: PO BOX 1629
Address 2:
Address 3:
Address 4:
City: PARKERSBURG
State: WV
Zip: 261021629
Country: US
DUNS:
+4:
Web Address:
Submit
Cancel
1. The DUNS fills in.
2. The correct address fills in.
3. Click "Submit".

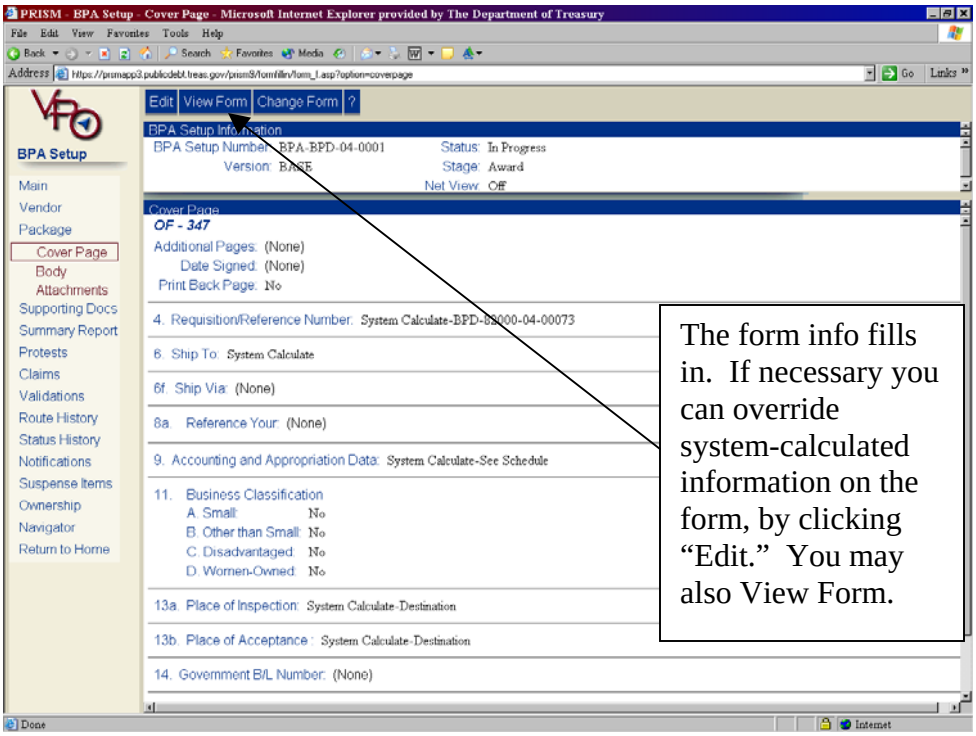
23.


PRISM - BPA Setup - Cover Page - Microsoft Internet Explorer provided by The Department of Treasury
BPA Setup
Main
Vendor
Package
Cover Page
Body
Attachments
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
Change Form
BPA Setup Information
BPA Setup Number: BPA-BPD-04-0001
Version: BASE
Status: In Progress
Stage: Award
Net View: Off
Cover Page
There is no form associated with this BPA Setup.
Choose Change Form to associate a form.
1. Click on "Package."
2. Select "Change Form."

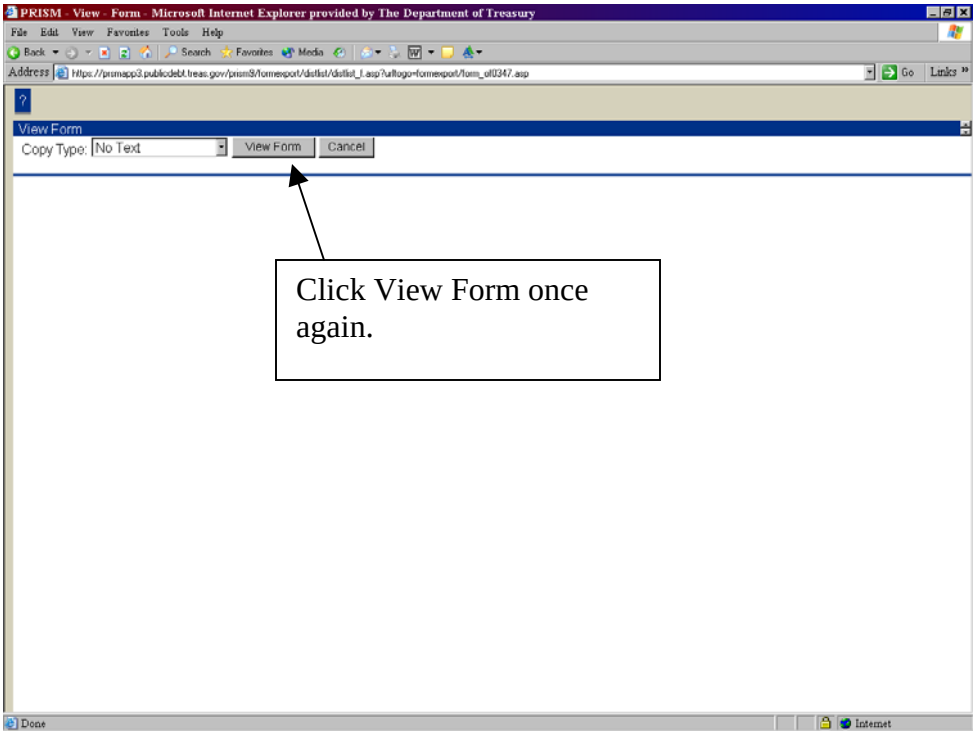
24.


PRISM - Form Selection - Microsoft Internet Explorer provided by The Department of Treasury
Form Selection
Search: Form For:
Display
Cancel
Results per page: 10
Form
Description
OF347(6-95) Order For Supplies (06-95)
SF 1442 Solicitation / Award (Construction)
SF 1447 Solicitation / Contract
SF 1449(4/2002) Solicitation / Order (Commercial) (4/02)
SF 252 Architect - Engineer Contract
SF 26 Award / Contract
SF 30 Modification of Contract
SF 33 Award Schedule A Only
Page 1 of 1
Choose the correct "Form" by clicking the link.

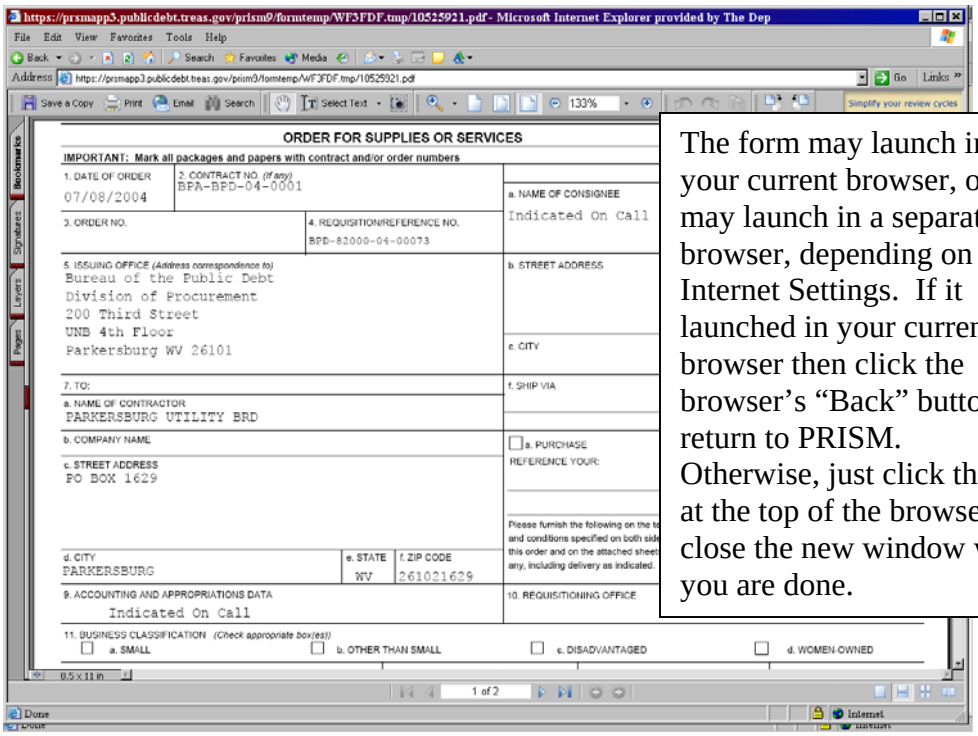
25.


PRISM - BPA Setup - Cover Page - Microsoft Internet Explorer provided by The Department of Treasury
Edit
View Form
Change Form
BPA Setup
Main
Vendor
Package
Cover Page
Body
Attachments
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
BPA Setup Number: BPA-BPD-04-0001
Version: BASE
Status: In Progress
Stage: Award
Net View: Off
Cover Page
OF - 347
Additional Pages: (None)
Date Signed: (None)
Print Back Page: No
4. Requisition/Reference Number: System Calculate-BPD-BP000-04-00073
6. Ship To: System Calculate
6f. Ship Via: (None)
8a. Reference Your: (None)
9. Accounting and Appropriation Data: System Calculate-See Schedule
11. Business Classification
A. Small: No
B. Other than Small: No
C. Disadvantaged: No
D. Women-Owned: No
13a. Place of Inspection: System Calculate-Destination
13b. Place of Acceptance: System Calculate-Destination
14. Government B/L Number: (None)
The form info fills in. If necessary you can override system-calculated information on the form, by clicking "Edit." You may also View Form.

26.

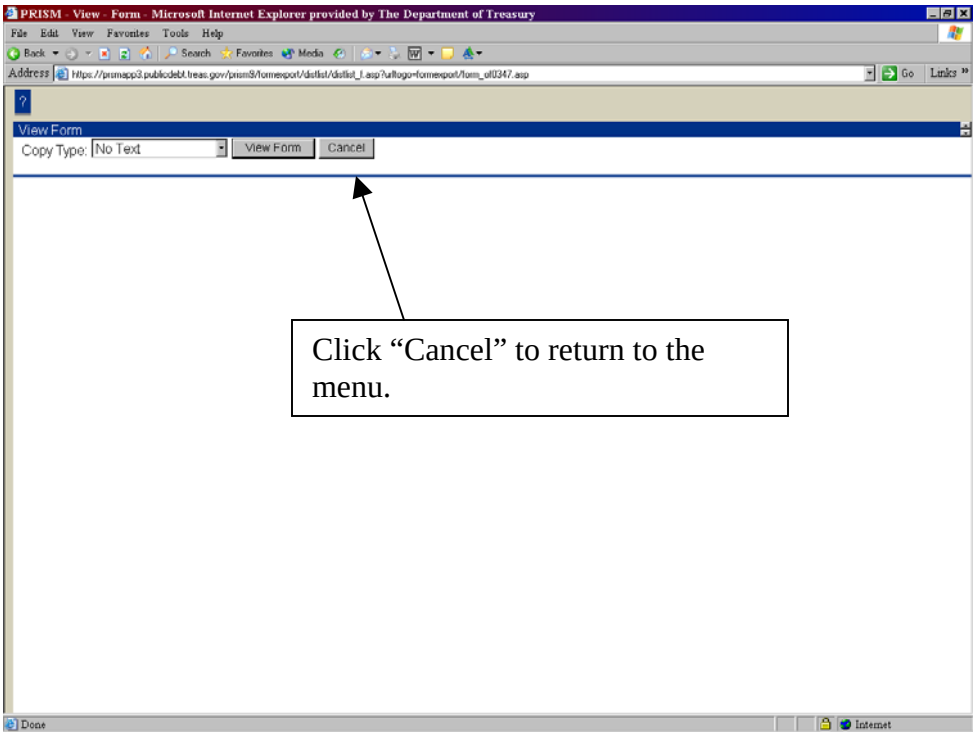

PRISM - View - Form - Microsoft Internet Explorer provided by The Department of Treasury
View Form
Copy Type: No Text
View Form
Cancel
Click View Form once again.

27.



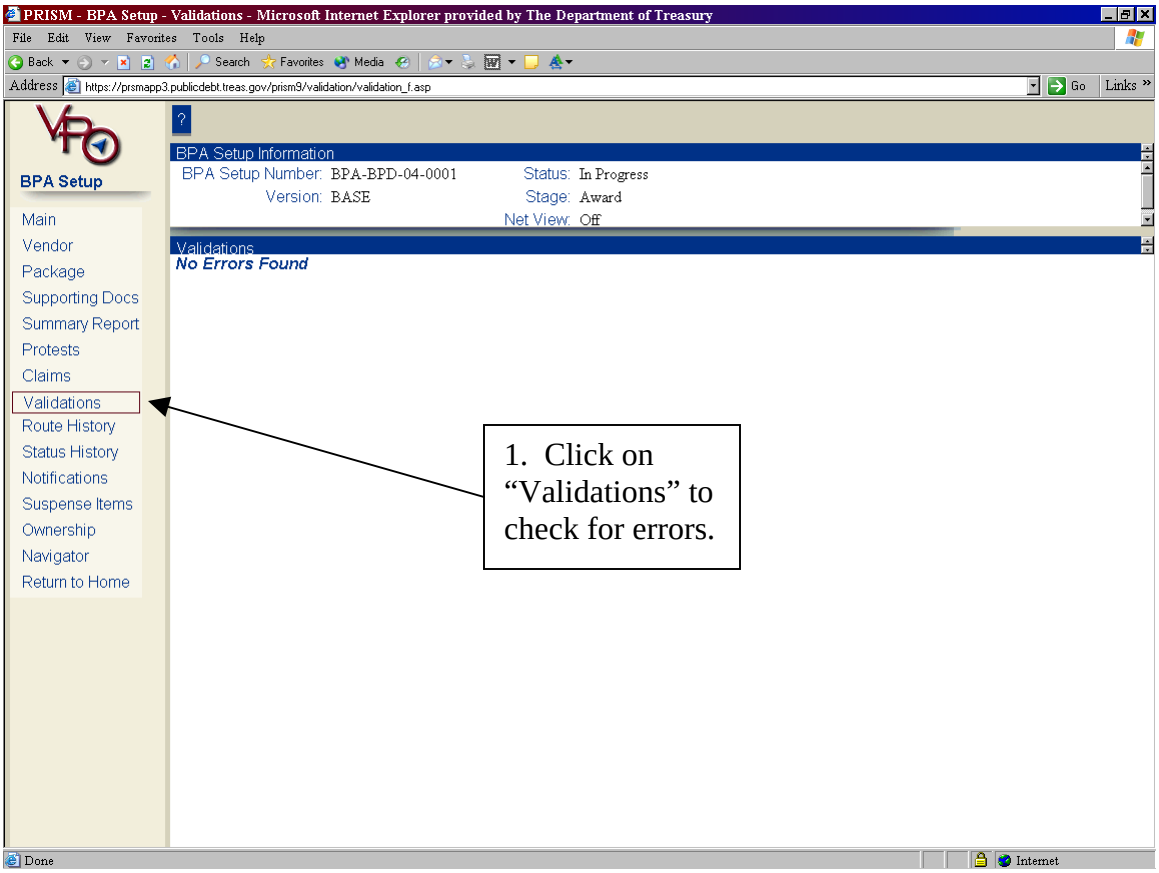
The form may launch in your current browser, or it may launch in a separate browser, depending on your Internet Settings. If it launched in your current browser then click the browser's "Back" button to return to PRISM. Otherwise, just click the "X" at the top of the browser to close the new window when you are done.

28.



Click "Cancel" to return to the menu.

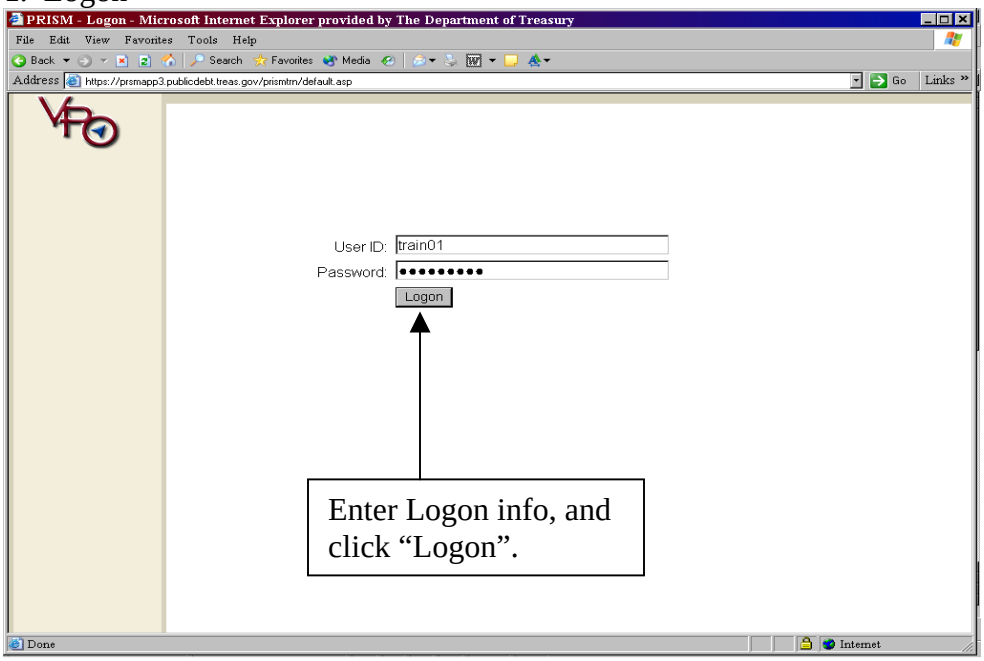
29.



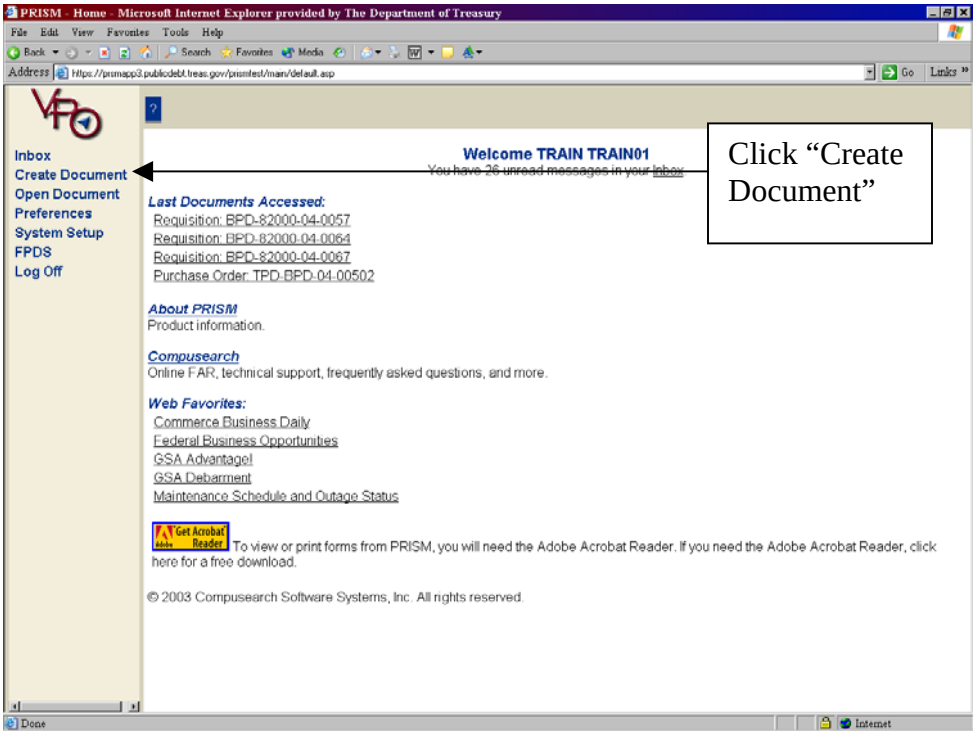
To route document use [Route Award for Approval] QRG.

BPA Calls

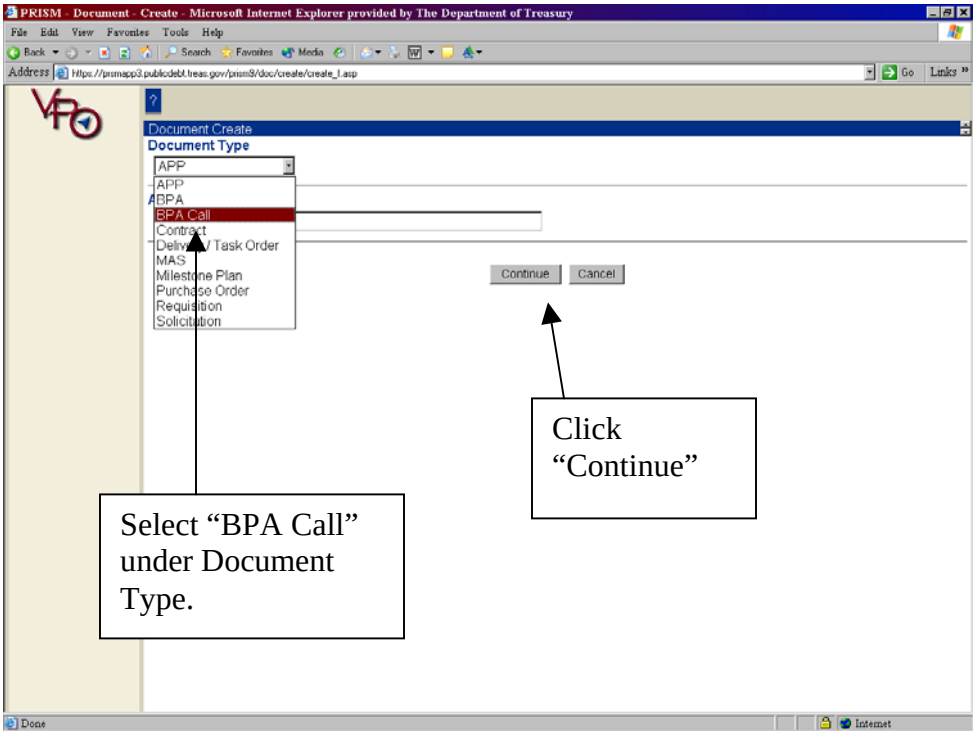
1. Logon



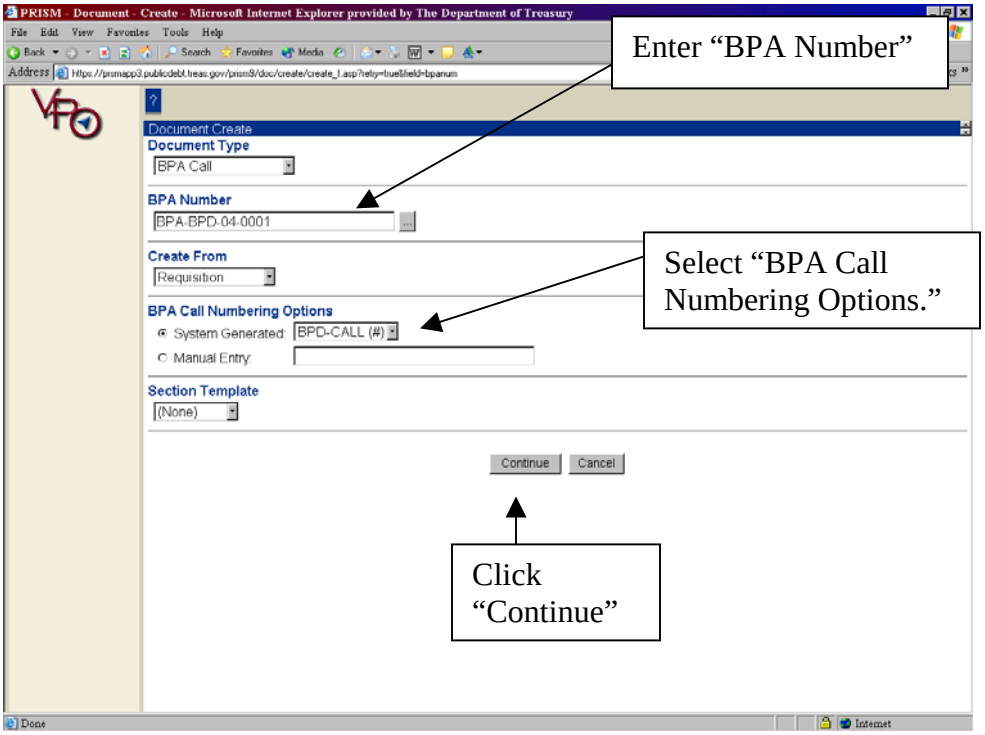
2.



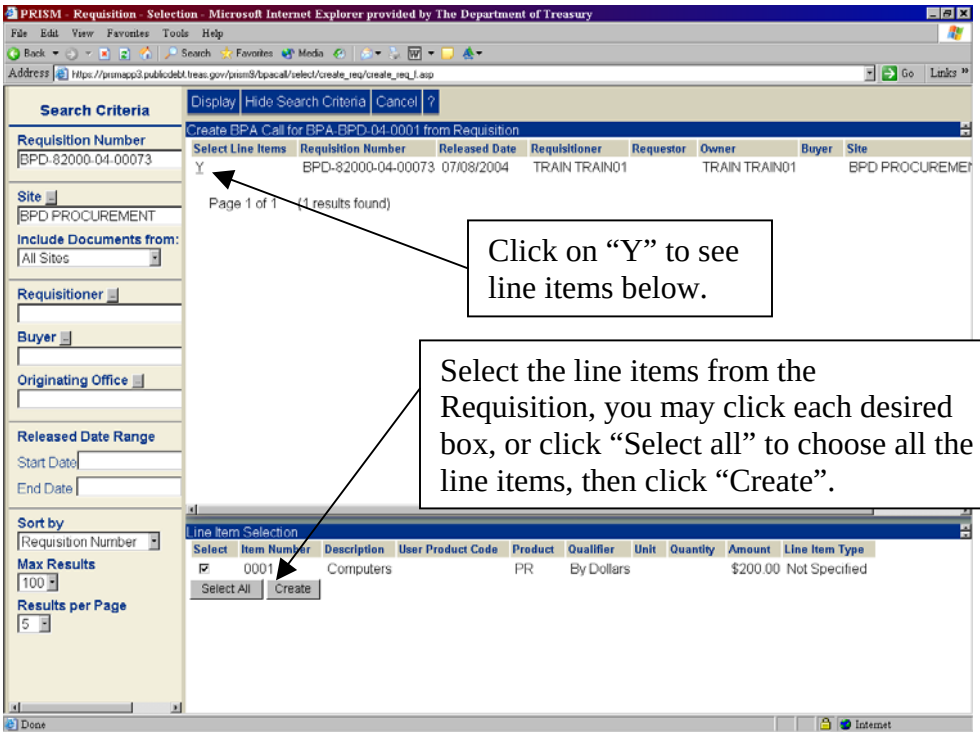
3.


PRISM - Document - Create - Microsoft Internet Explorer provided by The Department of Treasury
Document Create
Document Type
APP
APP
BPA
BPA Call
Contract
Delivery/Task Order
MAS
Milestone Plan
Purchase Order
Requisition
Solicitation
Continue
Cancel
Select "BPA Call" under Document Type.
Click "Continue"

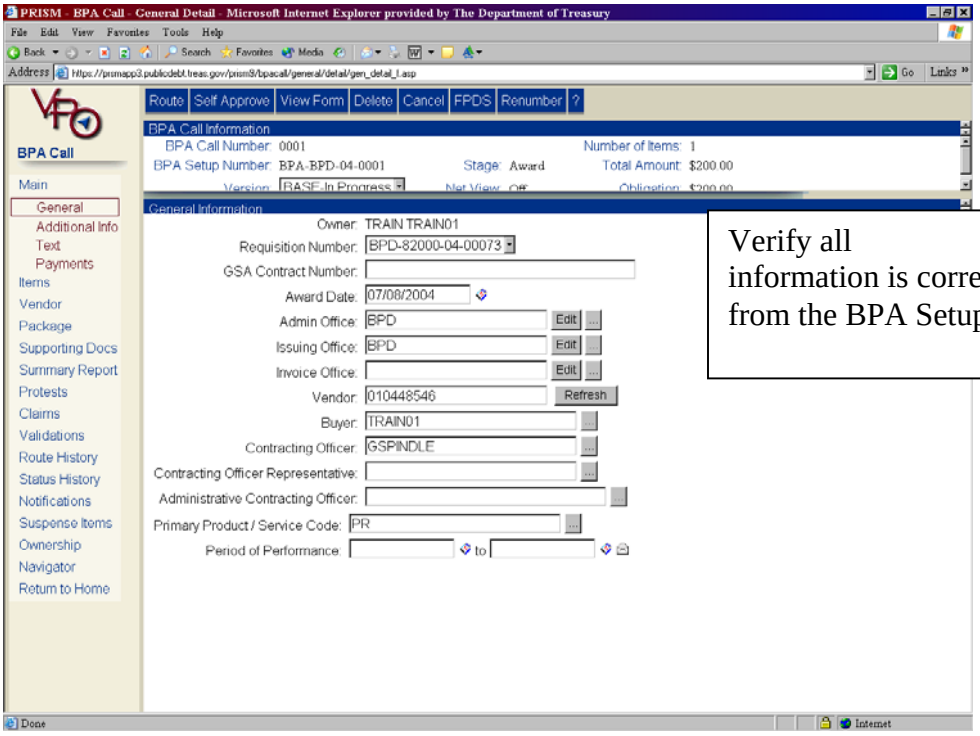
4.


PRISM - Document - Create - Microsoft Internet Explorer provided by The Department of Treasury
Enter "BPA Number"
Document Create
Document Type
BPA Call
BPA Number
BPA-BPD-04-0001
Create From
Requisition
BPA Call Numbering Options
System Generated
BPD-CALL (#)
Manual Entry
Section Template
(None)
Select "BPA Call Numbering Options."
Continue
Cancel
Click "Continue"

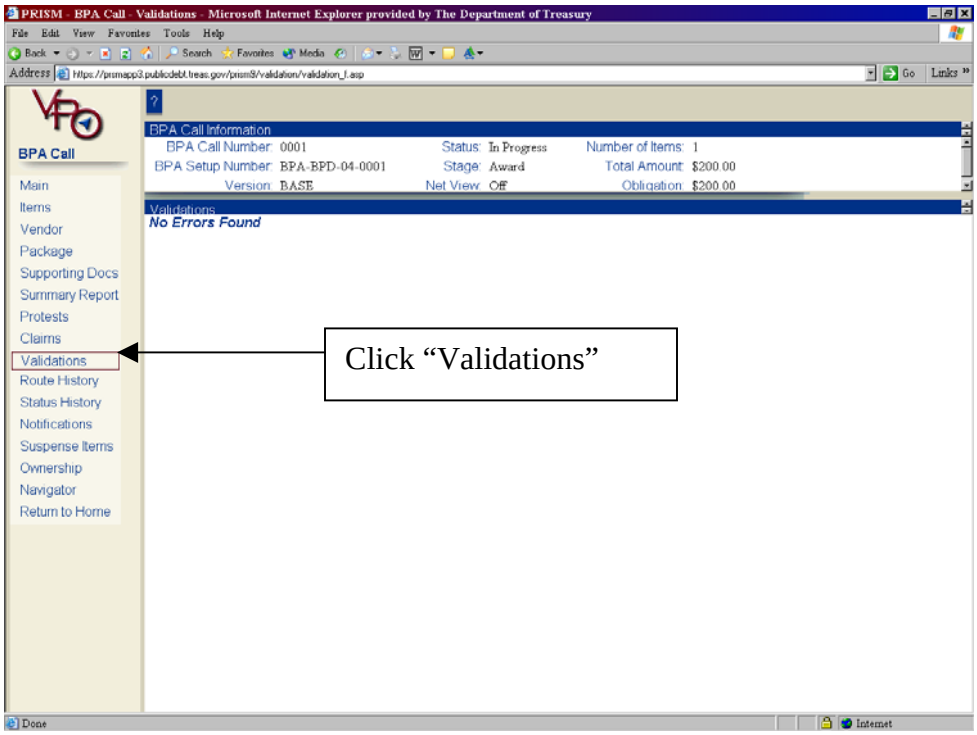
5.


PRISM - Requisition - Selection - Microsoft Internet Explorer provided by The Department of Treasury
Search Criteria
Requisition Number
BPD-82000-04-00073
Site
BPD PROCUREMENT
Include Documents from:
All Sites
Requisitioner
Buyer
Originating Office
Released Date Range
Start Date
End Date
Sort by
Requisition Number
Max Results
100
Results per Page
5
Display
Hide Search Criteria
Cancel
Create BPA Call for BPA-BPD-04-0001 from Requisition
Select Line Items
Requisition Number
Released Date
Requisitioner
Requestor
Owner
Buyer
Site
Y
BPD-82000-04-00073
07/08/2004
TRAIN TRAIN01
TRAIN TRAIN01
BPD PROCUREMEN
Page 1 of 1 (1 results found)
Click on "Y" to see line items below.
Select the line items from the Requisition, you may click each desired box, or click "Select all" to choose all the line items, then click "Create".
Line Item Selection
Select
Item Number
Description
User Product Code
Product
Qualifier
Unit
Quantity
Amount
Line Item Type
0001
Computers
PR
By Dollars
$200.00
Not Specified
Select All
Create
Done
Internet

6.


PRISM - BPA Call - General Detail - Microsoft Internet Explorer provided by The Department of Treasury
BPA Call
Main
General
Additional Info
Text
Payments
Items
Vendor
Package
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home
Route
Self Approve
View Form
Delete
Cancel
FPDS
Renumber
BPA Call Information
BPA Call Number: 0001
BPA Setup Number: BPA-BPD-04-0001
Number of Items: 1
Stage: Award
Total Amount: $200.00
General Information
Owner: TRAIN TRAIN01
Requisition Number: BPD-82000-04-00073
GSA Contract Number:
Award Date: 07/08/2004
Admin Office: BPD
Issuing Office: BPD
Invoice Office:
Vendor: 010448546
Refresh
Buyer: TRAIN01
Contracting Officer: GSPINDLE
Contracting Officer Representative:
Administrative Contracting Officer:
Primary Product / Service Code: PR
Period of Performance
to
Verify all information is correct from the BPA Setup.
Done
Internet

7.



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